



USDA Foreign Agricultural Service

# GAIN Report

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## Poland

### Food Processing Ingredients Sector

### Food manufacturing growing, Companies need inputs

2008

**Approved by:**

Eric Wenberg  
U.S. Embassy

**Prepared by:**

Jolanta Figurska, Pawel Flakiewicz and Kacie Fritz

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**Report Highlights:**

The food processing and catering industries in Poland are increasingly interested in importing processed fruits and vegetables and baking ingredients such as baking mixes and fats. There are over 33,000 food processing companies in Poland and the number grows each year; consumers have larger disposable incomes and are interested in quality products, so food manufacturing continues to enjoy a boom. A product that has been imported into the EU can be transported to Poland without additional tariffs and without meeting many additional regulatory requirements. This report lists the major food manufacturers and the ingredients they use already. An excellent opportunity to see these companies is IFE Poland, to be held next in May 20-22, 2009, in Warsaw. Contact [agwarsaw@fas.usda.gov](mailto:agwarsaw@fas.usda.gov) if you want to visit that show and make appointments with Polish companies.

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Includes PSD Changes: No  
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[PL]

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## SECTION I. MARKET SUMMARY

Poland's economy underwent a radical transformation to a market oriented economy between 1989 and 2001. During this period, the value of food consumption in Poland, in real terms, grew 25 percent. This transition continued to 2007 as the economy expanded and foreign direct investment continued. Food consumption patterns also changed, resulting in decreased consumption of milk and animal fats, sugar and potatoes. On the other hand, consumption of fruit, vegetables, processed red meat, poultry, vegetable fats, fish, cheese, yogurt, and highly processed food, significantly increased.

The sector is varied with both domestic and international companies represented on the market. The most important sub sectors of the food processing sector are meat, dairy, and alcohol, followed by confectionery, food concentrates, sugar, fruits and vegetables, juices and non-alcoholic beverages production.

Poland's EU accession boosted exports from the food processing industry (meat and dairy sectors) mostly to EU countries as well as to new markets located in Asia. This trend is expected to continue in the coming years. Some products are subject to new EU sanitary restrictions that prohibit their sale in Poland almost entirely, such as poultry and beef. Exporters of beef jerky need hormone free inputs.

EU membership also provides Poland with substantial financial assistance that is helping further modernization and growth in Poland. The structural development funding from the EU amounted to approximately \$15 billion dollars from 2004 to 2006, with about 15 percent of the total dedicated to rural development.

Poland experienced continued strong growth in 2007 with gross domestic product increasing by 6.6 percent, but this began to slow in early 2008 with lower production and sales growth. During the latest financial crisis, costs of production have increased, and many producers lost their competitiveness on the market. Additionally, many improvements are needed in the Polish food processing sector. More investment is needed from the formal institutions responsible for the food sector's development, promotion and organization of the processing industry needs changed, and there is no consolidation of fruit and vegetable processing institutions. These changes would improve the organization of processing, and lower costs of production. Polish producers, processing companies and salesmen are not cooperating properly. For some producers, the selling price of the item is not enough to cover the cost of producing it. If the situation does not change, there will be no chance to increase competitiveness on the open market.

Foreign trade is of high importance to the country's economy. In 2008, the food industry has generated 14 percent of GDP while the export of food products is 20 percent of the total food production sold. Eight percent of food companies sold 77 percent of total products in the food sector. In 2007, export of food by retail chains could have reached even \$600 million dollars, which would have been 4 percent of the whole value in food exports. Economic diversification is currently not a top priority for the Polish government, which means the country is at a higher risk to external shocks and global demand.

In January-April 2008, exports from Poland increased by 34.1 percent compared with the same period in 2007. This figure is due to the changing U.S. dollar-Polish zloty exchange rate as much as from increased volume of trade. The vast majority of Poland's exports, 80.4 percent, are destined for the EU. Agricultural products account for 13 percent of Poland's exports, with 60 percent sold to other EU members. Foreign direct investment (FDI) fell slightly in 2007 to 12.8 billion euro from 15.1 billion euro of FDI in 2006.

However, 2006 was a year of higher than average FDI, and foreign interest in investment in Poland remains strong. Poland is an attractive market and investment venue for foreign businesses. In 2007, Poland ranked 75<sup>th</sup> in the World Bank's ease of doing business index out of 175 countries.

Imports of agricultural products in 2008 (after the second quarter) totaled about \$4.9 billion, compared to \$7.1 billion in 2007 (whole year). About 69 percent of total food imports originated from the European Union. After 2 quarters of 2008 the value of agricultural products imported from the United States amounted to \$131 million USD, which represented 2.7 percent of all Polish agro-food imports. In 2007, the value of agricultural products imported from the United States was estimated at \$178 million USD. Imports from the United States were dominated by tobacco, poultry (primarily trans-shipments to Moldova and Ukraine) and red meat, but also included raw materials and semi-processed products, such as dairy protein isolates, tree nuts, hides and skins, processed fruits and vegetables.

Poland views the United States positively and U.S. products are considered high quality. Product that has been imported into the EU can be transported to Poland without additional tariffs and without meeting many additional regulatory requirements aside from required labeling in Polish language. Food processing and catering industries are increasingly interested in importing processed baking ingredients such as baking mixes and fats, flavors and aromas, sweeteners, food additives, food colors and enzymes. The food processing industry is developing rapidly and successfully and there is a high demand for high quality inputs.

*Table 1. Advantages and challenges for American products in the Polish market.*

Advantages	Challenges
Central Europe's most populous country with a domestic consumer market of nearly 40 million people.	U.S. products face high transportation costs as compared to many European competitors.
A strategic location within a dense, major international market offering re-export potential.	Complicated system of product registration in some cases delaying or even preventing products from entering the Polish market that are new to the EU.
Transshipment from other EU countries of import now possible with Poland's EU integration.	Poland's EU Accession puts United States products at a competitive disadvantage versus EU-27 duty-free EU internally traded products.
A very productive, young and skilled labor force therefore, good potential for finding trading partners and favorable conditions for establishing joint ventures.	Despite rising incomes, Polish consumers indicate that price is still the primary purchasing factor for food and beverage products in at least 75 percent or more of their retail food purchases.
Polish consumers associate United States products with good quality.	Food recalls in the EU have had a negative impact on Polish consumers' views of imported products, and GMO issues hamper imports of United States products.
Market niches exist in consumer ready food products - i.e. dried fruits, nuts, wine and distilled spirits, and microwavable products.	Foreign investment in the Polish food processing industry results in local production of many high quality products that were previously imported.
Economic growth has been rising and the U.S. dollar's depreciation makes U.S. imports more affordable.	While the export of some U.S. goods has been encouraged by EU trade regulations, some goods, namely poultry and beef, are limited due to EU sanitary restrictions.

## SECTION II. ROAD MAP FOR MARKET ENTRY

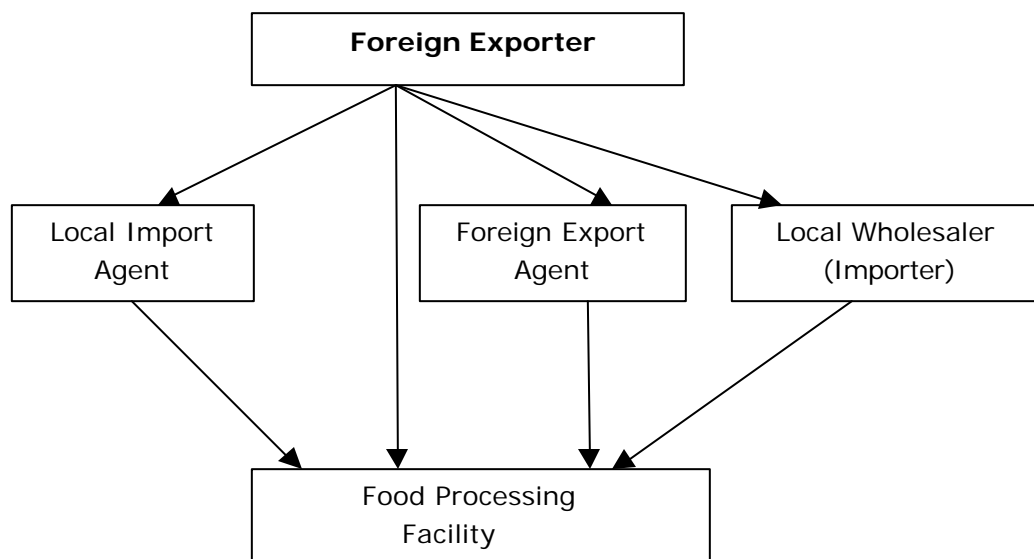
### A. Entry Strategy

Entering the Polish market is a challenge for exporters of raw materials intended for the food processing sector. The main obstacle is the use of low cost Polish products. Imported products are used only when less expensive domestic products are not available.

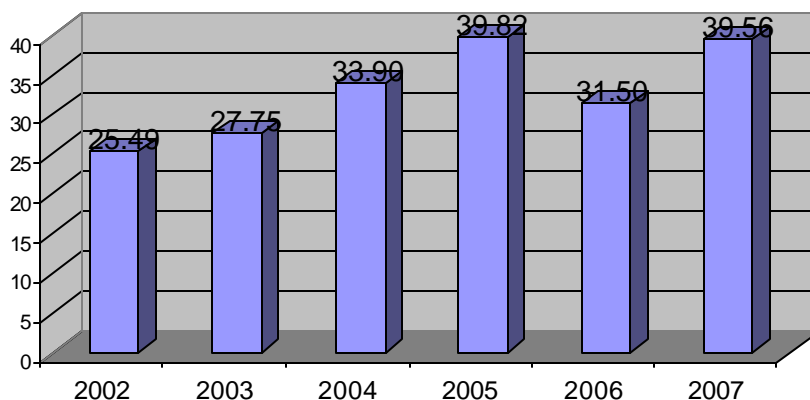
- I Some companies in the food processing sector purchase import products directly from Polish importers but most buy from wholesalers or local suppliers.
- II Some of the largest food processors have their own supply purchase units. In such case, at times, direct imports are conducted.
- III To be successful in Poland exporters must have a local representative or agent and personal contact with Polish businesses. To be competitive exporters must have a thorough knowledge of current laws, the local culture, tax and customs regulations, market structures, local exhibitions and trade fairs.

## B. Market Structure

### Distribution Flow



**Polish market of food and agricultural product  
(Billions of USD)**

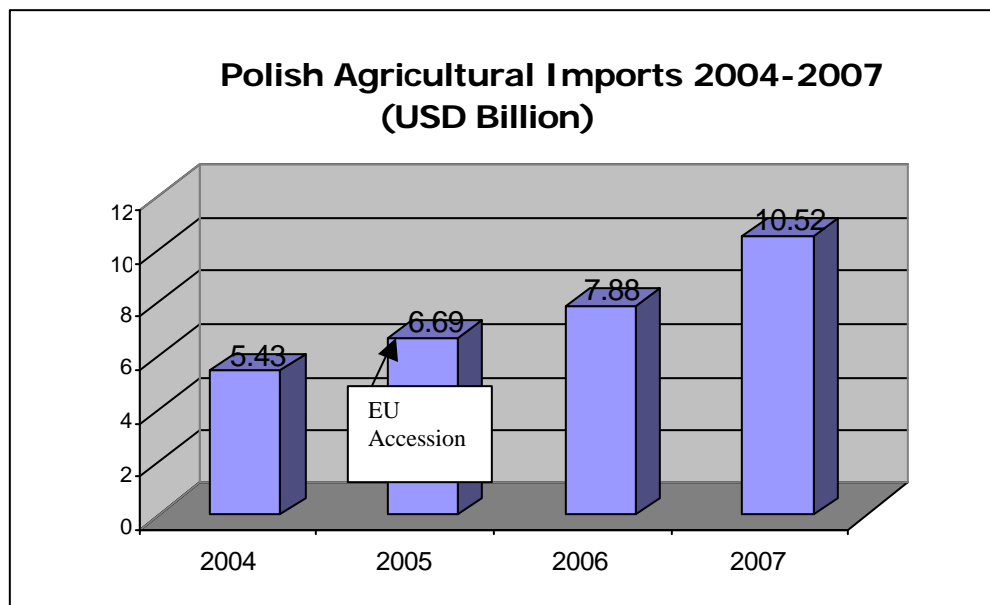


Source: PAIZ report based on GUS report

**Production of selected products of the Polish food industry 2005-2007**

Product	Unit of Measure	2005	2006	2007
Pork	Thousand tons	1,203	1,186	1,221
Poultry	Thousand tons	1,237	1,305	1,354
Cured meat products	Thousand tons	749	826	845
Cured poultry meat products	Thousand tons	126	108	118
Frozen sea fish	Thousand tons	78	50	49
Canned fish	Thousand tons	43	37	38
Frozen vegetables	Thousand tons	445	473	497
Canned vegetables	Thousand tons	148	142	133
Fruit and vegetable juices	Thousand hectoliters	8,886	7,938	6,638
Milk and cream powder	Thousand tons	193	164	170
Processed liquid milk	Thousand hectoliters	22,909	22,935	24,000
Butter	Thousand tons	180	173	182
Cheeses and curd	Thousand tons	605	646	670
Wheat flour	Thousand tons	2,488	2,543	2,399
Feeds used in farm animal breeding	Thousand tons	5,278	6,337	7,053
Fresh bakery products	Thousand tons	1,750	1,552	1,523
Sugar (in terms of white sugar)	Thousand tons	2,080	1,574	1,856
Pasta	Thousand tons	142	146	155
Vodka (100%)	Thousand hectoliters	790	833	928
Beer	Thousand hectoliters	31,400	33,953	36,896
Mineral waters and carbonated waters	Thousand hectoliters	22,700	25,699	27,077
Fermented beverages(excl.must and meads)	Thousand hectoliters	2,556	2,509	2,364
Tobacco products	Thousand tons	96	122	150

Source: PAIZ report based on GUS report



Source: PAIZ report based on GUS report; FAS' Global Trade Atlas

<b>Polish Agricultural Imports selected - 2007 (USD mln)</b>		<b>% Change 2007/2006</b>
Live animals	150.9	41%
Fish and seafood products (including processed)	982.7	18%
Grains	574.7	135%
Fresh fruit	1,010.1	34%
Fresh vegetables	387.9	48%
Oils and fats	535.4	20%
Processed Fruits & Vegetables	569.1	43%
Alcoholic beverages	438.7	56%
Tobacco	370.7	36%
Red meat and products	646.6	52%
Poultry meat & products	53.3	55%
Cheese	96.5	60%
<b>Total Polish agricultural imports in 2007</b>	<b>10,527.9</b>	

Source: PAIZ report based on GUS report



### C. Company Profiles

The Polish food industry consists of about 32,328 enterprises. Besides from food processing facilities, 36 facilities operate in the tobacco sector. As many as 23,184 food processing enterprises are small firms that employ fewer than 9 workers.

<b>Number of enterprises operating in the Polish food industry and tobacco sector (as of 4<sup>th</sup> quarter of 2007*)</b>						
		<b>Number of employed persons</b>				
<b>Sector</b>	<b>Total number of enterprises</b>	<9	10 - 49	50- 249	>249	>1000
Food industry	32,328	23,184	7,263	1,559	283	39
Tobacco Sector	36	16	6	6	5	3

\*It is estimated that the actual number of operating enterprises may be lower by as much as 30 percent because the REGON (company) register of economic entities is not updated by the State Statistical Service (GUS). The register contains the names of firms that no longer exist and the names of firms that have never began business activities.

Source: PAIZ report based on GUS report – REGON register of economic entities.

<b>Total number of enterprises operating in individual segments of the food industry in Poland(as of 4<sup>th</sup> quarter of 2007)</b>					
	<b>Number of employed persons</b>				
<b>Sector</b>	<b>Total</b>	<b>&lt; 9</b>	<b>10 – 49</b>	<b>50 – 249</b>	<b>&gt;249</b>
<b>Meat and meat products (15.1)</b>	5,990	4,044	1,406	447	93
<b>Fish and fish products (15.2)</b>	708	488	148	57	15
<b>Processed fruit and vegetables (15.3)</b>	1,877	1,329	363	158	27
<b>Oils, animal and vegetable fats (15.4)</b>	216	167	35	10	4
<b>Dairy goods (15.5)</b>	1,128	784	131	160	53
<b>Milled grain products, starch and starch products(15.6)</b>	1,764	1,516	187	55	6
<b>Animal feeds (15.7)</b>	841	612	190	32	7
<b>Other food products (15.8)</b>	14,893	10,244	4,110	470	69
<b>Beverages (15.9)</b>	1,560	1,062	368	97	33
<b>Total</b>	28,977	20,246	6,938	1,486	307

Source: PAIZ report based on GUS – REGON register of economic entities.

## Major Food Processing Manufacturers in Poland

<b>Rec num</b>	<b>Investor name</b>	<b>Country of regist</b>	<b>Country of origin</b>	<b>Activities (PKD)</b>	<b>Activities (class)</b>	<b>Comments</b>
1	Brouwerij Palm NV	Belgium	Belgium	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Browar Belgia Sp. z o. o.
2	Dossche	Belgium	Belgium	Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds;	Dossche Sp. z o. o. - Kalisz
3	Materne-Confilux S.A.	Belgium	Belgium	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Materne-Polska Sp. z o. o. - Lopatki
4	Chapman Ice Cream	Canada	Canada	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Chapman Ice Cream Poland Sp. z o. o. - Poznan
5	Podravka d.d.	Croatia	Croatia	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Podravka Polska Sp. z o. o. - Kostrzyn, Podravka International Export Import Sp. z o. o. - Warsaw
6	Kofola a.s.	Czech Republic	Czech Republic	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Kofola Sp. z o. o. - Office in Katowice, Kofola Sp. z o. o. - factory - Factory in Kutno
7	A.Espersen A/S	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	Espersen Polska Sp. z o. o. - Koszalin
8	ARLA FOODS AmbA	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Arla Foods Sp. z o. o. - Factory in Goscino near Kolobrzeg
9	Carlsberg Breweries A/S	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Carlsberg Polska S.A. - office in Warsaw, Carlsberg Marketing Polska Sp. z o. o. (Warsaw), Bosman Browar Szczecin S.A. (Szczecin), Slodownia Sierpc Spółka Sp. z o. o. (Sierpc, Mazowieckie Voivodship)
10	Dan Cake A/S	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Dan Cake Sp. z o. o. - Chrzanów

11	<b>Danish Brewery Group A/S</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Faxe Polska Sp. z o. o. Breweries in Koszalin and Jedrzejów-Browary Brok-Strzelec and Perła, Browary Lubelskie
12	<b>Danish Fast Food</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Dania Fast Food Sp. z o. o. – Warsaw
13	<b>House of Prince Denmark A/S</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	Scandinavian Tobacco S.A. – Myslenice
14	<b>Investeringsfonden for Ostlandene</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	36% stake in Prime Food Sp. z o. o. - Office in Przechlewo
15	<b>Merrild Cafe</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Prima S.A. – Poznan
16	<b>Schulstad Brod A/S</b>	Denmark	Denmark	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Lantmännen Axa Poland Sp. z o. o. – Poznan
17	<b>Lannen Tehtaatt OY</b>	Finland	Finland	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Lannen Polska Sp. z o. o. – Tolknicko
18	<b>Raisio Group</b>	Finland	Finland	Manufacture of food, drinks and tobacco products;	Manufacture of vegetable and animal oils and fats;	Raisio Polska Foods Sp. z o. o. - Karczew near Warsaw
19	<b>Barry Callebaut France S.A.</b>	France	Switzerland	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Barry Callebaut Sp. z o. o. – Łódź
20	<b>Belvedere S.A.</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	70% stake in Fabryka Wódek Gdanskich w Stargardzie Gdanskim S.A. - Activity in Starogard Gdanski. Stake in Krakowska Destylarnia Polmos S.A. - Activity in Kraków
21	<b>Bongrain</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	65% of shares in Mleczarnia Turek
22	<b>BSN Gervais Danone</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Danone Polska Sp. z o. o. - Office in Warsaw. Manufacturing plants in Warsaw and Bierun, Bakoma S.A. - Warsaw, Bakoma Nova Sp. z o. o. - Kutno, Bakoma Serwis Sp. z o. o.
23	<b>Bunge Investment France</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of vegetable and animal oils and fats;	Zakłady Tłuszczowe Kruszwica S.A. – Kruszwica
24	<b>L.D.C. S.A.</b>	France	France	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	98.9% stake in Drosed S.A. - Office in Siedlce
25	<b>LACTALIS</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Lactalis Polska Sp. z o. o. - Warsaw, Polser Sp. z o. o. - Operation of dairies and cheese making in Siemiatycze

26	<b>Lesaffre Group</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Lesaffre bio-corporation Sp. z o. o. - Wolczyn, Advanced Biotechnologies Corporation Sp. z o. o. - Warsaw, Pomorska Fabryka Drozdzy Polmos S.A. - Tczew
27	<b>Malteries Soufflet S.A.</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Slodownia Soufflet Polska Sp. z o. o. – Poznan
28	<b>Michel Marbot</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Danuta S.A. – Malbork
29	<b>Saint Louis Sucre International S.A.S.</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Slaska Spółka Cukrowa S.A.
30	<b>Seita</b>	France	France	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	Altadis Polska S.A. - Radom
31	<b>Bahlsen Beteiligung GmbH</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Bahlsen Sweet Sp. z o. o. - (formerly Bahlsen Konzentraty Spozywcze S.A.) - Skawina, Bahlsen Sp. z o. o. - Poznan, Bahlsen Sweet Sp. z o. o., Bahlsen Snack - World Sp. z o. o. - Olawa, Tarnowo Podgórne
32	<b>Bauer Fruchtsaft GmbH</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	O.K. - Owocowe Koncentraty Sp. z o. o. - Przeworsk
33	<b>Binder International GmbH</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Binder International Warszawa Sp. z o. o. - Warsaw
34	<b>British American Tobacco GmbH</b>	Germany	United Kingdom/USA	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	British - American Tobacco Polska S.A. - Augustów

35	Dr August Oetker Nahrungsmittel KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Dr Oetker Srodki Odzywcze Gdansk-Oliwa Sp. z o. o. - Sdnice Sp. z o. o.
37	FmB & Co. KG	Germany	Germany	Manufacture of tobacco products;	Manufacture of prepared animal feeds;	Usnice - Usnice, Office in Gdansk
36	Eckes-Granini Int. Franz	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Gdanskie Mlyny i Spichlerze Dr Cordesmeyer Sp. z o. o. - Office in Gdansk
38	Cordesmeyer	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of grain mill products, starches and starch products;	
39	Franz Zentis GmbH Co.KO	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Zentis Polska Sp. z o. o. - Factory in Zelk6w near Siedlce
40	Friedrich Weissheimer Maltzfabrik KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	49% in Baltic Malt Sp. Z o. o. - Office in Gdansk. Malt production plant in Gdansk
41	Frosta AG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Frosta Sp. z o. o. - Bydgoszcz, Warsaw
42	Hans Hoell Fleischwarenfabrik AG, Co KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	Hoell-Pol Zaklad Miesny Sp. z o. o. - Kaszczor
43	Hemelter Muhle GmbH	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of grain mill products, starches and starch products;	Gdanskie Mlyny i Spichlerze Dr. Cordesmeyer Ltd. Sp. z o. o. - Gdansk
44	Henkell&Sohnle in KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Torunskie Pivnice Win Vinpol Sp. z o. o. - Torun
45	Hochland AG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Hochland Polska Sp. Z o. o. - Kazmierz
46	Hohenstaufen Neunundvierzigste Vermögensverwaltungsgesellschaft GmbH	Germany	Germany	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Mc Cain Poland Sp. z o. o. - Strzelin
47	Intersnack Knabber Gebaeck GmbH & Co. K.G.	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Polsnack Sp. z o. o. - Office in Warsaw. Factory in Nysa
48	Karl Konecke Fleischwarenfabrik GmbH & Co. KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	Konecke Sp. z o. o. - Slubice
49	Kruger GmbH	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Kruger Polska Sp. z o. o. - Ostr6w Mazowiecka Kruger Polska Handel i Eksport Sp. z o. o. - Warsaw
50	Lohmann AG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	49.04% stake in Drobimex Sp. z o. o. Office in Szczecin
51	Ludwig Schokolade GmbH & Co. KG	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Ludwig Czekolada Sp. z o. o. - Tuczno, Wielkopolskie Voivodship
52	OSI International Holding GmbH	Germany	USA	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	Esca Food Solutions Sp. z o. o. - Warsaw

53	<b>Paul Wesjohann &amp; Co. GmbH</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	48.63% stake in Drobimex Sp. z o. o. Office in Szczecin
54	<b>Pfeifer und Langen</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Pfeifer und Langen Marketing Sp. z o. o. - Plants in Sroda Wlkp., Koscian, Gostyn and Miejska Górka
55	<b>Raiffeisen HaGe</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds;	Raiffpol Sp. z o. o. - Slupsk
56	<b>Schoeller</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Schoeller Artykuly Spozywcze Sp. z o. o. - Office in Warsaw. Plant in Namysłów
57	<b>Sektkellerei Schloss Wachenheim AG</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Bilograjska Wytwórnia Win Ambra S.A. - Bilgoraj
58	<b>Südzucker AG</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Südzucker Polska Sp. z o. o. (Wrocław), 90.22% stake in Slaska Spółka Cukrowa S.A., 96.33% stake in Cukier Malopolski S.A., 83% stake in Cukrownia Strzyzów S.A., 52.62% stake in Cukrownia Ropczyce S.A.
59	<b>Tchibo Frisch Rost Kaffee GmbH</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Tchibo Warsaw Sp. z o. o. - Marki
60	<b>Zott GmbH&amp;Co KG</b>	Germany	Germany	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Zott Polska Sp. z o. o. - Opole
61	<b>CC HBC (Coca-Cola Hellenic Bottling Company)</b>	Greece	USA	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Coca Cola HBC Polska Sp. z o. o. - Warsaw, Coca-Cola Poland Services Sp. z o. o. - Office in Warsaw. 3 plants in Łódź, Staniatki near Kraków and Radzimin
62	<b>Chipita</b>	Greece	Greece	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Chipita Poland Sp. z o. o. - Warsaw, Chipita Sp. z o. o. - Factory in Tomaszów Mazowiecki
63	<b>Globus</b>	Hungary	Hungary	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Globus Polska Sp. z o. o. - 3 food freezers in Lipno, Dabrowa Chelminska and Adamowo. Refrigerator in Elk
64	<b>Hero</b>	International	International	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Hero Polska Sp. z o. o. - Plock
65	<b>Herisson Ltd</b>	Ireland	Canada	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Fantasy Foods Sp. z o. o. - Kobyłka near Warsaw
66	<b>Ferrero Group</b>	Italy	Italy	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Ferrero Polska Sp. z o. o. - Warsaw
67	<b>GIF SRL.</b>	Italy	Italy	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Frubella Processing Sp. z o. o. - Białobrzegi
68	<b>Indafin Srl</b>	Italy	Italy	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Inda Polska Sp. z o. o. - Warsaw
69	<b>Societe Europeenne De Conserve S.A.</b>	Italy	Italy	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Konserwa Polska Sp. z o. o. - Łódź

70	<b>Europar-Ven Company Establishment</b>	Lichtenstein	Lichtenstein	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Eurovita Sp. z o. o. - Poznan
71	<b>Terravita Holding Establishment</b>	Lichtenstein	Lichtenstein	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	15.17% stake in Terravita Sp. z o. o. - Poznan
72	<b>Orkla Foods A.S.</b>	Norway	Norway	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	88% stake in Kotlin Sp. z o. o. - Kotlin Elbro Sp. z o. o. - Warsaw
73	<b>Rieber and Son ASA</b>	Norway	Norway	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Rieber Foods Polska S.A. - Wloclawek
74	<b>Bagdasarian</b>	Russia	Russia	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Sniezka S.A. - Swiebodzice
75	<b>SABMiller Plc</b>	South Africa	South Africa	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Kompania Piwowarska S.A. - Poznan, Kompania Piwowarska S.A. - Bialystok
76	<b>ABBA Seafood AB</b>	Sweden	Sweden	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	Superfish S.A. - Kolobrzeg
77	<b>Cloetta Fazer AB</b>	Sweden	Sweden	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Cloetta Fazer Polska Sp. z o. o. - Gdansk
78	<b>POLARICA AB</b>	Sweden	Sweden	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Polfrys Sp. z o. o. - Swidwin (Zachodniopomorskie Voivodeship)
79	<b>Saturn Nordic Holding AB</b>	Sweden	Denmark	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	82.54% stake in SOKOLÓW S.A.
80	<b>Vin &amp; Spirit AB</b>	Sweden	Sweden	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	85% stake in Lubuska Wytwórnia Wódek Gatunkowych Polmos - Activity in Zielona Góra
81	<b>CEREAL PARTNERS WORLDWIDE ( CPW )</b>	Switzerland	Switzerland	Manufacture of food, drinks and tobacco products;	Manufacture of grain mill products, starches and starch products;	Torun Pacific Sp. z o. o.
82	<b>Finagrain Compagnie Agricole et Financiere</b>	Switzerland	Switzerland	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	ANIMEX - Opolskie Zakłady Drobiarskie S.A. -Opole
83	<b>Hiestand Holding AG</b>	Switzerland	Switzerland	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Hiestand Polska Sp. z o. o. - Grodzisk Mazowiecki, Hiestand Sp. z o. o. - Kraków
84	<b>Kraft Jacobs Suchard AG</b>	Switzerland	Switzerland	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Kraft Foods Polska S.A. - Warsaw, Kraft Polska S.A. - Jankowice, Olza S.A. - Cieszyn,
85	<b>CEPV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Farm Frites Poland S.A. - Lebork, Farm Frites Poland Dwa Sp. z o. o. - Wielka Wies

86	<b>CSM NV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Leaf Poland Sp. z o. o. - Office in Warsaw. Chewing gum factory in Legionowo near Warsaw
87	<b>Harbin B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	30.8% stake in Grupa Zywiec S.A.
88	<b>Heineken International B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Heineken Polska Sp. z o. o. - Warsaw Grupa Zywiec S.A.
89	<b>Johan van Leendert B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	Agro-Bor Louisa Sp. z o. o. - Kostrzyn
90	<b>Natel Investment BV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	McLean Brothers Poland Sp. z o. o. - Szczecin
91	<b>Nutreco International B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds;	Trouw Nutrition Polska Sp. z o. o. - Grodzisk Mazowiecki
92	<b>Philip Morris Holland B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	99.89% stake in Philip Morris Polska S.A. Office in Kraków. Factories in Kraków and Lezajsk
93	<b>Polish Bakery Investment BV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	70% of shares in Elite Polska Sp. z o. o. - Office in Szczecin, Spółdzielnia Produkcji Spożywczej Społem - Remaining 30% owned
94	<b>Provimi Holding BV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds;	Provimi-Rolimpex S.A. - Companies in Osnowo, Białystok, Dobrzelin, Jarosław, Olsztyn, Tworóg - fodder production
95	<b>Royal Numico N.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Nutricia Polska Sp. z o. o. - Warsaw and Opole 66% of shares in Okręgowa Spółdzielnia Mleczarska - Office in Węgrów (Mazowieckie Voivodship)
96	<b>Union Caffè Confectionary Group BV</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Elite Cafe Sp. z o. o. - coffee roasting plant in Tarnowo Podgórne near Poznań
97	<b>Windjammer Investments B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Kompania Piwowarska S.A. - Poznań
98	<b>Zeelandia International Holding B.V.</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Zeelandia Sp. z o. o. - Tarnowo Podgórne
99	<b>British Sugar Overseas (BSO) Ltd.</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	BSO Polska Sp. z o. o. (British Sugar Overseas) - Warsaw, 68% stake in Sugarpol - Activity in Toruń, 53.46% stake in Cukrownia Głinojeck S.A., Cukrownia Pelplin S.A., Cukrownia Guzów S.A., Sugar Tor Sp. z o. o., Sugarpol
100	<b>Cadbury</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Cadbury Wedel Sp. z o. o. - Bielany Wrocławskie Cadbury Wedel - Warsaw
101	<b>Caribbean Distillers Corporation Ltd.</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	85% stake in Polmos Lancut S.A. Office in Lancut



102	<b>Gallaher Group Plc</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	Gallaher Polska Sp. z o. o. - Office in Warsaw. Factory in Gostkowice (Łódzkie Voivodeship)
103	<b>Gerber Foods Holdings Ltd</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	EMIG Sp. z o. o. - Office in Warsaw. Factory in Mogielnica
104	<b>Imperial Tobacco Plc</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of tobacco products;	96.4% stake in Imperial Tobacco S.A. (Jankowice near Tarnowo Podgórze)
105	<b>Uniq plc</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	Lisner Sp. z o. o. - Poznan
106	<b>United Biscuits Investments</b>	United Kingdom	United Kingdom	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	Zakłady Przemysłu Cukierniczego SAN S.A. - Jarosław
107	<b>Cargill Inc.</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds;	Cargill Polska Sp. z o. o. - Office in Warsaw, Cargill Polska Sp. z o. o. - factory - Bielany Wrocławskie
108	<b>Corey Durling</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of dairy products;	Bona Sp. z o. o. - Złotów
109	<b>CPIG (Chicago Poland Investment Group) LLC</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Browar Namysłów Sp. z o. o. - Namysłów
110	<b>Gerber Finance Company</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	Alima - Gerber S.A. - Rzeszów, Warsaw
111	<b>H.J. Heinz Company</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables;	H.J. Heinz Polska S.A. - Pudliszki
112	<b>McLane International Inc.</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Processing and preserving of fish and fish products;	McLane Polska Sp. z o. o. - Blonie
113	<b>Millenium Import LLC</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	Polmos Zyrardów Sp. z o. o. - Zyrardów
114	<b>Peacock Corporation</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	65% stake in Podlaska Wytwórnia Wódek Polmos S.A. - Siedlce
115	<b>PepsiCo</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of beverages;	PepsiCo General Bottlers Poland Sp. z o. o. - Bottling plants in Łódź, Białystok, Gdansk, Kraków, Poznan, Szczecin, Wrocław, Żywiec and Pniewy. Salted snacks factory in Grodzisk Mazowiecki. Sale of "Delicja" confectionery to Danone
116	<b>Smithfield Foods</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Production, processing and preserving of meat and meat products;	Animex - Krakowskie Zakłady Pierzarskie Sp. z o.o. - Kraków, ANIMEX Grupa Drobiarska Sp. z o.o. - Suwałki, Animex Sp. z o. o. - Warsaw, Animex-Pasze Sp. z o.o. - Zamosc, Contipasz S.A. - Grodków, Grupa Animex S.A. - Ostróda,
117	<b>Wm. Wrigley Jr. Company</b>	USA	USA	Manufacture of food, drinks and tobacco products;	Manufacture of other food products;	99.96% stake in Wrigley Poland Sp. z o. o. - Office in Poznan
118	<b>Perrier S.A.</b>	France	France	Manufacture of food, drinks and tobacco products;	Processing and preserving of fruit and vegetables; manufacture of beverages;	85% stake in Wyporowa S.A. Agros Holding S. A.

119	<b>Nestlé S.A.</b>	Switzerland	Switzerland	Manufacture of food, drinks and tobacco products; Manufacture of food, drinks and tobacco products;	Manufacture of other food products; Manufacture of beverages;	Nestlé Polska S.A. - Warsaw, Kalisz, Poznan. 50% stake in Naleczowianka Sp. z o. o. - office in Naleczów
120	<b>Mars Inc.</b>	USA	USA	Manufacture of food, drinks and tobacco products; Manufacture of food, drinks and tobacco products;	Manufacture of prepared animal feeds; manufacture of other food products;	Master Foods Polska Sp. z o. o. - Sochaczew
121	<b>Marga B.V</b>	The Netherlands	The Netherlands	Manufacture of food, drinks and tobacco products; Manufacture of chemicals and chemical products;	Manufacture of vegetable and animal oils and fats; Processing and preserving of fish and fish products; Manufacture of soap and detergents, cleaning and polishing preparations, perfumes and toilet preparations;	Unilever Polska S.A. - Office in Warsaw. Manufacturing plants in Bydgoszcz, Barino near Gdansk, Katowice and Poznan
122	<b>CEDC (Central European Distribution Corporation)</b>	USA	USA	Manufacture of food, drinks and tobacco products; Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods;	Manufacture of beverages; Wholesale of food, beverages and tobacco;	Carey Agri International Poland Sp. z o. o. - Warsaw, 61% stake in Polmos Bialystok S.A., PWW Sp. z o. o. - Warsaw, MTC Sp. z o. o. - Bialystok, PHA Sp. z o. o. - Zielona Góra
123	<b>Fortrade Financing SPA</b>	Italy	Italy	Manufacture of food, drinks and tobacco products; financial intermediation;	Production, processing and preserving of meat and meat products; other financial intermediation;	Fortrade Financing Warsaw Sp. z o. o., FIM Tower - Warsaw, Fortrade Leasing S.A. - Katowice, Zakłady Miesne PFM Stanisławów, Dolina Lak Sp. z o. o. - Malaszewicze, "Dolina Lak - Dystrybucja" Sp. z o. o. - Malaszewicze (Lubelskie Voivodship), PFM Sochocin

Source: PAIZ report

#### D. Sector Trends

Further development of the food processing industry in the next 5-10 years will be stimulated by:

- The increased demands of local as well as foreign (E.U., Russia, Ukraine and other Eastern European and Central Asian countries) food markets
- Increased demand for processed fruit, vegetables, milk, fish, and meat
- Increased demand for convenience products (highly processed, easy to cook, ready to eat),
- Increased demand for semi-processed food products for home meal preparation
- Increased demand for organic foods, produced without using chemicals.
- Further reduction in presence of small local processing, giving way to domination by large plants. Food processed by small plants is generally of lower quality and costs more than food processed by larger plants. Industry experts predict that foreign investment in the food processing industry will continue for several years, until

medium sized players are eliminated from the market.

Due to increasing demand food processing industry is increasing production of various health food products.

The influence of western consumption habits and increased income contribute to the development of food processing industry.

Membership in the European Union has created new export opportunities for domestic food processors in segments of the food processing industry where Poland has a competitive advantage in the EU. Poland's advantage is mainly in processed milk production (cheese and yogurt) and frozen fruit and vegetables. Significant investments are necessary to adapt the Polish food industry (particularly dairy and meat producers) to the EU standards. Such investments can be partly financed with EU funds.

The Polish food processing industry will undergo changes in the structure of food products, but also in further modernization and concentration of food processing. These changes will occur in response to market demands as well as by the Polish food industry adapting to EU standards (hygiene, veterinary, quality, and wholesomeness of food).

Foreign investments have played a significant role in developing and modernizing the Polish food processing industry. Throughout 2006 total foreign investments in the food industry exceeded 3.07 millions of dollars. American companies are the largest foreign investors in this sector. The following companies have invested in the food processing sector:

- **Coca Cola Beverages**
- **Pepsico: production of beverages, snacks, confectionery products**
- **Smithfield: meat processing**
- **Mars Incorporated (Master Foods): production of confectionery products and animal feeds**
- **McDonalds, Burger King: fast food**
- **Cargill Inc: production of animal feeds**
- **H.J. Heinz Company: Processing and preserving of fruit and vegetables**
- **Wrigley: confectionery**
- **Peacock Corporation: Manufacture of beverages**
- **Corey Durling: Manufacture of dairy products**

### **SECTION III. COMPETITION**

European Union companies are the main competitors in the food processing sector for U.S. exporters and investors. Currently, over 60 percent of food product (processed and raw materials) imports come from EU countries, particularly Germany, The Netherlands, and Denmark. Companies from the EU and the United States are the most significant foreign investors in the Polish food processing sector.

U.S. products compete with European Union fish and seafood, alcohol (wine, distilled spirits and beer), processed fruits (preserved and dried), non-alcoholic beverages, dairy products (cheese, ice-cream), condiments, snacks and food additives.

<b>Product Category(thousand tones;USD millions)</b>	<b>Major Supply Sources in 2007</b>	<b>Strengths of Key Supply Countries</b>	<b>Advantages and Disadvantages of Local Suppliers</b>
<b>Frozen Fish</b>  <i>Imports: 74.5</i>  <i>Value: \$169.0</i>	1. Netherlands-27%  2. Norway-15%  3. Russia-12%  USA - is an insignificant supplier (2%)	A supply very price competitive; mackerel to the fish canning industry.  C supply high quality, price competitive fish products demanded by the major fish canning companies.	Local seafood production is significant in volume and is price competitive.
<b>Frozen Fillets</b>  <i>Imports: 126.6</i>  <i>Value: \$298.2</i>	1.Vietnam – 32%  2.China – 27%  3.Norway-14%  USA - is an insignificant supplier(4%)	Vietnam and China are aggressive suppliers of price competitive products.	Poland is not a significant producer of frozen fillets.
<b>Prunes</b>  <i>Imports: 5.6</i>  <i>Value: \$13.0</i>	1. Chile – 51%  2. USA - 20%  3. Argentina - 10%	Chile supplies high quality prunes to processors. Demand for higher quality offers U.S. prunes opportunity to develop the market.	Poland is not a significant producer of prunes.

<b>Almonds</b>  <i>Imports: 3.7</i>  <i>Value: \$24.0</i>	1.Spain-48%  2.USA-17%  3.Germany-9%	Spanish product is of high quality and does not face tariffs, being part of EU. Spain is also transshipping U.S. almonds to Poland.	Poland does not produce almonds.
<b>Pistachios</b>  <i>Imports: 2.2</i>  <i>Value: \$13.0</i>	1.Germany-45%  2.Iran-9%  3.Luxembourg-8%  USA - is an insignificant supplier(2%)	Germany is the main transshipment point for U.S. and Iranian pistachios. Demand for higher quality offers U.S. pistachios opportunity to develop the market.	Poland does not produce pistachios.
<b>Sunflower seeds</b>  <i>Imports: 28.3</i>  <i>Value: \$23.0</i>	1.Hungary-49%  2.China-13%  3.Ukraine-11%  USA - 5%	Hungarian product is of high quality and does not face tariffs, being part of EU.	Limited local production. Poland relies on imports.
<b>Raisins</b>  <i>Imports: 15.2</i>  <i>Value: \$19.3</i>	1.Iran-50%  2.China-12%  3.Germany-12%  USA - is an insignificant supplier(3%)	Iran is a traditional supplier to Poland. Market is still price sensitive.	Poland does not produce raisins.
<b>Peanuts</b>  <i>Imports: 46.5</i>  <i>Value: \$58.0</i>	1.Argentina-83%  2.Netherlands-45%  3.China-14%  USA - is an insignificant supplier	Argentina and China are traditional suppliers to Poland. Market is still price sensitive but high end customers are interested in U.S. products.	Poland does not produce peanuts.

<b>Protein isolates</b>  <i>Imports: 8.6</i>  <i>Value: \$33.8</i>	1.Belgium-34%  2.China-26%  3.Denmark-13%   USA – 8%	Belgian product is of high quality and does not face tariffs, being part of EU. China is also an important supplier to Poland. Market is still price sensitive but high end customers are interested in U.S. products.	Poland is not a significant producer of protein isolates.
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## SECTION IV. BEST PRODUCT PROSPECTS

### A. PRODUCTS WHICH HAVE BEST SALES POTENTIAL:

- Seafood: (salmon, butterfish, herring, mackerel, black cod)
- Dried Fruit (prunes)
- Nuts (almonds, pistachios, peanuts)
- Food processing ingredients:
  - dairy isoglucose concentrates
  - high quality spices and mixes (tex-mex)
  - vegetable fat for process

Import Statistics On Some Of The Commodities With Best Sales Potential(USD Million)						
CN Code	Product Category	2007 Market Size mln\$	2007 Polish imports mln\$	5 Yr Average imp growth %	Key constraints	Market attractiveness for USA
0303	<b>Frozen Fish</b>	\$49.5	\$169.0	-1%	U.S. product is considered to be expensive. Polish importers are mostly interested in cheaper varieties. Large competition exists from European suppliers.	Polish market is interested in the following varieties (H&G): salmon (keta, gorbusha) butterfish, herring, mackerel, black cod, halibut.

030420	<b>Frozen Fillets</b>	\$190.7	\$298.2	18%	U.S. product is considered to be expensive. Polish importers are mostly interested in purchasing product for further processing (cans). Some U.S. suppliers are only able to provide whole fish versus filets (herring). Also mackerel and herring varieties from the U.S. have less fat content than the European varieties.	Polish market is interested in the following varieties: herring, mackerel, cod, halibut.
081320	<b>Prunes</b>	\$14.3	\$13.0	12%	U.S. product is considered to be expensive. Active competition exists from Argentina and Chile.	Polish importers consider U.S. product to be of high quality and import it for usage in high end food products.
080212	<b>Almonds</b>	\$24.0	\$24.0	8%	U.S. product is considered to be expensive. Active competition from Spain.	Polish importers consider U.S. product to be of high quality and import it for usage in high end food products. Each year value of transshipments are considerably increasing.
080250	<b>Pistachios</b>	\$13.0	\$13.0	15%	U.S. product is considered to be expensive. Active competition from Iran.	Polish importers consider U.S. product to be of high quality and import it in order to supply delicatessen customers. Recently hypermarkets also expressed interest in this product.
120600	<b>Sunflower Seeds</b>	\$23.5	\$23.0	7%	U.S. product is considered to be expensive. Active competition exists from Hungary and China.	Polish bakery industry is becoming increasingly interested in using this product.
080620	<b>Raisins</b>	\$19.3	\$19.3	1%	U.S. product is considered to be expensive. Active competition exists from Iran.	Polish bakery industry is becoming increasingly interested in using high quality product from the U.S.
200811	<b>Ground nuts</b>	\$17.0	\$17.0	24%	U.S. product is considered to be expensive. Active competition exists from Argentina.	Polish food processing is interesting in using U.S. product in high end products.

350400	<b>Protein isolates</b>	\$33.0	\$33.0	1%	Belgian and Chinese producers are actively promoting their product on the Polish market.	Polish food processing industry as well as producers of supplies for body building are increasingly interested in the U.S. products.
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3301;3302	<b>Flavors and Aromas</b>	N/A	\$294.3	25%	Most of the product is imported through Germany.	
2102;2106;3507;17019100	<b>Bakery ingredients</b>	N/A	\$460.5	20%	U.S. product is considered to be expensive. Active competition exists from Argentina and Chile.	Polish importers consider U.S. product to be of high quality and import it for usage in high end food products.
2923;1702;1703;1108;1109	<b>Starch, emulsifiers, starch derivates</b>	N/A	\$189.9	30%	U.S. product is considered to be expensive. Active competition from Spain.	Polish importers consider U.S. product to be of high quality and import it for usage in high end food products. Each year value of transshipments are considerably increasing.
292511	<b>Sweeteners (saccharin)</b>	N/A	\$1,1	20%	U.S. product is considered to be expensive. Active competition from Iran.	Polish importers consider U.S. product to be of high quality and import it in order to supply delicatessen customers. Recently hypermarkets also expressed interest in this product.
3203;3204	<b>Food colours</b>	N/A	\$126.2	10%	U.S. product is considered to be expensive. Active competition exists from Hungary and China.	Polish bakery industry is becoming increasingly interested in using this product.
3507	<b>Food enzymes</b>	N/A	\$57.5	12%	U.S. product is considered to be expensive. Active competition exists from Iran.	Polish bakery industry is becoming increasingly interested in using high quality product from the U.S.
1108;1109	<b>Fibres, dietary ingredients</b>	N/A	\$44.5	30%	U.S. product is considered to be expensive. Active competition exists from Argentina.	Polish food processing is interesting in using U.S. product in high end products.

**SECTION V. POST CONTACT AND FURTHER INFORMATION**

If you have any questions or comments regarding this report, or need assistance in exporting to Poland, please contact the Office of Agricultural Affairs in Warsaw, at the following address:

Office of Agricultural Affairs

American Embassy

Al. Ujazdowskie 29/31

00-540 Warsaw

Poland

ph: 48-22 504 2336

fax: 48-22 504 2320

e-mail: [agwarsaw@usda.gov](mailto:agwarsaw@usda.gov)

homepage: <http://poland.usembassy.gov/poland/agric.html>

For more information on exporting U.S. food products to Poland, including "The Exporter's Guide", "The HRI Sector Report", "The Retail Food Sector Report", product briefs on the market potential for U.S. fruit, wine and dried fruits and nuts, please visit the Foreign Agricultural Service home page: <http://www.fas.usda.gov>. Importer lists are also available from our office to exporters of U.S. food products.